



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Director's Office Management Officer

Job Code Title

Administrative Services Manager III

Pay Band

6c

Job Code Number

113116

Director's Office

Executive Office

Fair Labor Standards Act

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Director's Office supports the agency's Director and is composed of four work units: Legal Services Office; Office of Tax Policy and Research; Office of Human Resources and Organizational Development; and the Executive Office. The Executive Office includes the administrative support staff, fiscal administrator, public relations, and taxpayer assistance and public outreach.

Job Responsibilities

The Director's Office Management Officer coordinates and administers overall functions of the director's office. The incumbent monitors department-wide operational issues for the director and division managers; manages executive resources and communications; and coordinates special projects for the director and division administrators. The position reports to the director and supervises the Executive Office administrative support staff.

• Executive Office Coordination 60%

1. Analyzes and evaluates performance indicators such as budgets, surveys, error logs, etc. to ensure the overall effectiveness of office management and administrative support operations and services. Coordinates with program managers and staff, cooperators, and others to identify and resolve deficiencies; evaluate changing operational and service needs; and develop new approaches to operational and service delivery issues (budget adjustments, revised procedures, expanded services).
2. Prepares correspondence in response to requests or inquiries. Plans, schedules, and assigns special projects. Coordinates activities with other divisions and local and state agencies. Writes, transcribes, and edits statistical and narrative reports, spreadsheets, and other technical documents to provide accurate, complete, and accessible references
3. Develops work unit specific databases and other record management activities and oversees quality control of this information. Develops and establishes new database structures, queries, reports as well as manual filing systems and procedures. Maintains data with current information. Conducts and oversees quality assurances. Responds to unusual or complex records requests. Coordinates and oversees records retention and disposal procedures to ensure compliance with applicable requirements
4. Coordinates and monitors contracts for equipment, materials, and services. Assists in developing Invitations for Bids and Requests for Proposals. Recommends selection criteria.

- Coordinates review and selection. Monitors contract delivery. Tracks contract performance, expenditures, and outcomes to identify and resolve deficiencies.
5. Supports executive committees, advisory boards, task forces, and other decision-making bodies. Ensures availability of information, facilities, schedules, and other necessities. Responds to technical or procedural questions; researches and compiles requested information; develops reports and summaries; and provides a variety of other support services as directed.
 6. Responds to unusually complex or contentious issues referred by other staff. Coordinates with other offices to promote consistency in office operations. Identifies resource-sharing opportunities, resolves common problems, and promotes interoffice coordination and support throughout the department.
 7. Researches and compiles general and specialized program information. Ensures consistent messaging on department policies, procedures, and statutes. Drafts, proofs, and finalizes correspondence for signature by department managers as requested.
 8. Monitors and evaluates ongoing department workflow, logistics, schedules, and other concerns to inform the director and division managers of operational issues. Tracks various programs' performance standards and progress toward goals. Identifies actual or potential conflicts and impediments affecting operations. Coordinates with division managers to resolve problems. Develops and recommends new procedures and processes to promote consistency, efficiency, and cost effectiveness.
 9. Coordinates and tracks director's office budgets. Informs the director of the overall budget status, projections, deviations, and processes. Critically reviews budget and fiscal reports submitted to the director's office to verify compliance, justify expenditures, and compile director's office budget data. Researches and analyzes allocations, expenditures, and justifications to provide specialized reports and recommendations as requested.
 10. Manages and coordinates the director's schedules to ensure effective allocation of executive time and resources to internal and external issues. Evaluates requests for executive consultation, assessment, representation, and decision-making. Determines relative significance and prioritizing requests. Recommends direct or indirect involvement, referral, or delegation by the director.
 11. Evaluates comments, complaints, and requests from public officials, private interests, members of the public, and others on a range of issues associated with tax appraisal, collection, enforcement, and agency programs and operations. Assesses written and verbal communications to determine relative significance and appropriate responses including referring issues to the director; coordinating with managers and staff to develop responses; or delegating responses to subordinate staff.
 12. Previews and edits written communications from department managers to ensure appropriate messaging. Advises originators of sensitive, contentious, and uncertain content. Verifies claims, references, and citations. Promotes department objectives related to customer service, compliance, and consistency in communications.
 13. Coordinates internal communications between the director and department managers to ensure effective flow of information. Establishes and maintains communication tools, materials, and schedules for Helena-based and field managers. Develops and distributes summaries of management decisions, initiatives, and directives. Informs the director and managers of appropriate discussions and decisions from unattended meetings. Coordinates contacts between meetings as requested.
 14. Coordinates special projects requested by the director and division administrators to deliver specialized information, products, and services affecting department-wide operations and programs. Consults with the director and agency managers to identify specific needs and objectives. Develops and recommends project plans. Coordinates internal and external communications and resources necessary to deliver projects.
 15. Analyzes, evaluates, and applies statutory requirements related to receiving, maintaining, and disposing of sensitive taxpayer data. Monitors ongoing data flow to ensure compliance. Develops new processes and procedures in response to changing requirements.

- **Staff Leadership, Management, and Supervision 35%**

Incumbent is responsible for leading staff and managing the day-to-day activities of the office. Responsibilities include monitoring the progress of work plans, goals, and objectives and aligning them with the department's goals and priorities. Supervision and development of staff is imperative to a manager's success.

Staff Leadership

1. Creates and maintains a high performance environment characterized by enthusiastic and positive leadership, direction, and a strong team orientation. Motivates employees to accomplish numerous division goals and objectives. Coordinates performance measures with staff. Encourages the development of new techniques or solutions to problems and assists with the resolution.
2. Readily adapts to changes in existing operations, programs, services, activities, and functions. Makes recommendations. Takes necessary action to implement or accommodate changes. Maintains a positive attitude in communication to staff even when difficult changes arise.
3. Maintains an atmosphere of safety within the office. Ensures adequate training for all staff in proper lifting techniques, sensible ergonomic practices, and work-specific safety opportunities.
4. Makes and accepts responsibility for decisions necessary to carry out the director's office mission.
5. Accepts direction and feedback from supervisors and follows through appropriately.

Management

1. Conducts strategic planning in coordination with the director to develop and establish short and long-range plans. Participates in development of viable goals and objectives consistent with agency priorities.
2. Develops programs, policies, and procedures to assure the citizens of Montana that the department operates in accordance with the highest standard of integrity and ethics.
3. Evaluates state and national standards; new trends and technologies; office needs; and other factors to integrate requirements and resources into program plans.
4. Establishes priorities, deadlines, and work plans for program activities. Evaluates workflow processes, efficiencies, and problems to identify the most effective use of staff and material resources to meet goals and objectives. Appropriately allocates resources to accomplish assigned work by coordinating with other work units and programs and adjusting subordinate assignments as needed. Considers pertinent factors such as available resources, staff ability, timelines, and work load. Identifies the need for additional staff or resources while maintaining fiscal responsibility.
5. Plans, schedules, and assigns special projects. Initiates adjustments to reflect changes in overall division and agency goals, operations, and relationships to departmental divisions.
6. Reviews and monitors progress through meetings and consultations. Conducts staff meetings, disseminates data, and promotes information exchange for support and advancement of department mission and goals. Uses input from the staff to guide program responsibilities.
7. Recommends program budgets for staff and equipment. Reviews allocations, project plans and objectives, and expenditures.
8. Identifies information needs and develops reports, information systems, spreadsheets, and other tracking methods to monitor program status, work progress, unit performance, and individual performance. Uses data to identify areas of concern, strengths, and weaknesses. Provides analysis and recommends solutions to department management to resolve problems. Oversees quality control of information and sources.
9. Prepares correspondence in response to requests or inquiries. Ensures that necessary reports, correspondence, documentation, administrative actions, files, and records are correctly prepared, completed, maintained, and processed in accordance with applicable guidelines and time frames. Ensures the office follows department expectations regarding disclosure and employee confidentiality.

Supervision

1. Recruits and hires employees. Interviews applicants and makes appropriate selection recommendations according to applicable laws, rules, policies, procedures, and guidelines. Ensures proper training and orientation of new employees.
2. Establishes criteria for acceptable work behavior and performance. Promotes workplace efficiency and productivity by educating, mentoring, coaching, and correcting employee behavior. Encourages exceptional performance and improvement in areas of individual weakness. Develops and monitors corrective actions.
3. Appropriately reviews, recommends, and initiates personnel actions according to applicable policies, procedures, and guidelines. Carefully considers options available. Works with Human Resources to take appropriate disciplinary action as needed. Enforces disciplinary policies.
4. Recognizes and promptly resolves internal and external issues. Mediates personnel issues in a very timely manner.
5. Completes employee performance reviews. Defines goals and required results at the beginning of the performance review period. Communicates on a very regular basis with staff on progress toward those goals and results.
6. Determines the training needs of staff through analysis of program effectiveness, new technology and policies, and staff performance. Ensures consistency in the application of training opportunities for all staff. Develops and enhances on-the-job training opportunities to ensure staff is provided the needed training to fulfill their job duties including cross-training opportunities. Provides necessary information and tools to staff to complete any new tasks and duties.
7. Communicates policy and procedures clearly and effectively in order to obtain desired results. Ensures staff adhere to rules, policies, and procedures.
8. Monitors and approves staff leave usage while ensuring adequate coverage is maintained.
9. Upholds and promotes the department's conviction to customer service throughout agency contacts as well as in communication with taxpayers. Staff is held accountable for providing the highest level of customer service to all those that they come into contact with.

- **Other Duties as Assigned 5%**

1. Performs other duties as assigned by the director.
2. Acts for the director as assigned.

Job Requirements

To perform successfully as a management officer, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Strong communication skills and the ability to communicate effectively and respectfully are required. The incumbent is required to analyze complex issues; identify others' underlying concerns and motives; deal with controversy and hostility in a professional and objective manner; establish effective relationships with others; and work effectively under pressure. Seasoned judgment in decision making is necessary since the work is performed with minimal guidance and within broad guidelines. It is essential that the incumbent has the ability to work independently but also as part of a team; maintain a high performance team, and make sound decisions and be accountable for them. The incumbent is expected to apply critical thinking skills; be a problem solver with the ability to identify and resolve tactical and strategic issues before they become problematic; resolve operational issues; elevate matters as necessary; recommend solutions; and effectively implement division changes and management directives. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires knowledge of executive office management and department functions. Knowledge of general management practices including strategic planning; principles and methods of work planning; performance management including setting goals, objectives, and measures; operational and program

planning; quality assurance methods; organizational development; project management; and governmental organizational structure, accounting, and budgeting is required. The work also requires knowledge of computers and database management including state and department information systems (GenTax, ORION, SABHRS); data collection, analysis, and reporting techniques; contract solicitation and monitoring; structures, functions, and protocols associated with formal boards and committees; compliance requirements and practices; customer service standards; business communications; records management; state and federal funding requirements; agency policies, procedures, and guidelines; supervisory principles and practices; department and state personnel policies, procedures, and precedents; and employment law.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in business, public administration, or directly related field and three years of job-related work experience including one year of supervision and/or management.
 - Seven years of progressively responsible office management experience and program planning or equivalent will substitute for the above education and experience. Executive office management experience is preferred.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

This position has considerable mental stress and pressure due to supervisory issues; workload; conflicting, multiple priorities; critical projects with hard deadlines; time constraints; significance of decisions made; the challenging nature of contacts with taxpayers, elected officials, etc.; and coordination of all functions of the Executive Office. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. Work hours may exceed 40 hours per week from time to time. Leading up to and during legislative sessions work hours routinely exceed 40 hours per week and may include working evenings and weekends. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Alan Peura, Deputy Director Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____ Date: _____

Name (print): _____